

Global Extreme Ultraviolet (EUV) Photoresist Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Extreme Ultraviolet (EUV) Photoresist market size is expected to reach \$ 865 million by 2032, rising at a market growth of 11.1% CAGR during the forecast period (2026-2032).

Extreme ultraviolet photoresist is a critical patterning material used in the 13.5 nm extreme ultraviolet exposure process for advanced semiconductor manufacturing. It is mainly used to transfer nanoscale circuit patterns from a photomask onto the surface of a silicon wafer, forming fine structures for subsequent etching or deposition. It addresses the requirements of advanced logic chips and advanced memory devices for higher resolution, lower line width roughness, tighter critical dimension uniformity, stochastic defect control, and stable process windows at smaller feature sizes. This product is usually supplied to wafer fabs in the form of liquid spin-on photoresist, compatible developers, and related ancillary materials. Together with EUV exposure tools, photomasks, coating and developing equipment, etching equipment, and metrology systems, it forms the patterning system for advanced process nodes. EUV photoresist has entered the commercial supply stage in advanced wafer manufacturing. Its main customers are advanced logic foundries, IDM companies, DRAM manufacturers, and high-end memory producers. Purchasing decisions depend heavily on customer qualification, batch-to-batch consistency, defect levels, and co-development capabilities with customer process flows.

Extreme ultraviolet photoresist is a critical material category formed as advanced semiconductor manufacturing moves toward smaller feature sizes. Compared with mature photoresists such as KrF and ArF, EUV photoresist faces a complex balance among 13.5 nm high-energy photons, stochastic defects, line edge roughness, exposure dose, etch resistance, and customer process windows. EUV photoresist has

become part of advanced-node patterning capability, and corporate competition has expanded from formulation supply to joint optimization with wafer fab processes including exposure, development, etching, and metrology.

From the perspective of the corporate landscape, the EUV photoresist industry is highly concentrated and characterized by strict qualification requirements. Japanese companies account for the clear majority, including Tokyo Ohka Kogyo, JSR, Shin-Etsu Chemical, FUJIFILM, and Sumitomo Chemical, while Qnity inherits the former DuPont electronic materials platform. Core semiconductor photoresist manufacturers mainly come from Japan, the United States, and South Korea. In 2025, the top six semiconductor photoresist producers accounted for approximately 83.91% of the global market, and Japan was also one of the major production regions. This concentration is not determined simply by capacity, but by customer qualification cycles, metal ion control, defect control, and co-development capabilities with advanced wafer fabs. Switching costs for EUV products are extremely high, and wafer fabs do not easily replace materials that have already passed qualification, giving leading companies clear customer stickiness.

From the perspective of growth prospects, EUV photoresist benefits from the adoption of advanced logic, advanced memory, and High-NA EUV. EUV photoresist is the fastest-growing subcategory among photoresist products, with its revenue share rising from 11.19% in 2025 to 16.37% in 2032. As AI chips, HPC processors, advanced foundry nodes, and high-end DRAM continue to advance, the number of EUV exposure layers in critical processes will increase, and customer requirements for low defects, low LWR, high resolution, and acceptable exposure dose will continue to rise. At the same time, metal oxide photoresists, negative tone imaging materials, contact hole-specific formulations, and line-and-space-specific formulations will drive further product segmentation. Overall, EUV photoresist is a small-scale, high-value, high-barrier materials market driven by advanced process expansion, and its future growth will depend more on advanced wafer capacity and customer qualification schedules.

This report studies the global Extreme Ultraviolet (EUV) Photoresist production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Extreme Ultraviolet (EUV) Photoresist and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Extreme Ultraviolet (EUV) Photoresist that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Extreme Ultraviolet (EUV) Photoresist total production and demand, 2021-2032, (MT)

Global Extreme Ultraviolet (EUV) Photoresist total production value, 2021-2032, (USD Million)

Global Extreme Ultraviolet (EUV) Photoresist production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (MT), (based on production site)

Global Extreme Ultraviolet (EUV) Photoresist consumption by region & country, CAGR, 2021-2032 & (MT)

U.S. VS China: Extreme Ultraviolet (EUV) Photoresist domestic production, consumption, key domestic manufacturers and share

Global Extreme Ultraviolet (EUV) Photoresist production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (MT)

Global Extreme Ultraviolet (EUV) Photoresist production by Type, production, value, CAGR, 2021-2032, (USD Million) & (MT)

Global Extreme Ultraviolet (EUV) Photoresist production by Application, production, value, CAGR, 2021-2032, (USD Million) & (MT)

This report profiles key players in the global Extreme Ultraviolet (EUV) Photoresist market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Tokyo Ohka Kogyo, JSR / Inpria, Shin-Etsu Chemical, FUJIFILM, Sumitomo Chemical, Qnity Electronics, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Extreme Ultraviolet (EUV) Photoresist market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (MT) and average price (US\$/MT) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Extreme Ultraviolet (EUV) Photoresist Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Extreme Ultraviolet (EUV) Photoresist Market, Segmentation by Type:

Dry Photoresist

Liquid Photoresist

Global Extreme Ultraviolet (EUV) Photoresist Market, Segmentation by Development Effect:

Positive EUV Photoresist

Negative EUV Photoresist

Global Extreme Ultraviolet (EUV) Photoresist Market, Segmentation by Technology Route:

Metal Oxide EUV Photoresist

Molecular Glass EUV Photoresist

Other

Global Extreme Ultraviolet (EUV) Photoresist Market, Segmentation by Application:

Logic Chip Manufacturing

Memory Chip Manufacturing

Other

Companies Profiled:

Tokyo Ohka Kogyo

JSR / Inpria

Shin-Etsu Chemical

FUJIFILM

Sumitomo Chemical

Qnity Electronics

Key Questions Answered:

1. How big is the global Extreme Ultraviolet (EUV) Photoresist market?
2. What is the demand of the global Extreme Ultraviolet (EUV) Photoresist market?
3. What is the year over year growth of the global Extreme Ultraviolet (EUV) Photoresist market?
4. What is the production and production value of the global Extreme Ultraviolet (EUV) Photoresist market?
5. Who are the key producers in the global Extreme Ultraviolet (EUV) Photoresist market?
6. What are the growth factors driving the market demand?

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